Hendrix College Psychology Department
Sona Systems
Guide for Researchers

https://hendrix.sona-systems.com

This document will describe your responsibilities as a researcher and the policies and procedures that you will need to follow in order to maintain your right to use the Sona System to recruit participants. At the end of this document, you will find step-by-step instructions for adding new studies, adding individual sessions to studies, deleting sessions, and granting or denying credit to participants. **Please read through this document carefully and e-mail the Research Participation System Coordinator (psypool@hendrix.edu) if you have any questions.**

Table of Contents:

MUST READ:

General information 2

Important policies 3-4

General procedures

Requesting a researcher account 5

Gaining HSRB approval to use Sona Systems for participant recruitment ... 5

Adding a new study 6-8

Adding sessions to a study 9

Deleting sessions from a study 9-10

Granting or denying participant credit 10-11

End-of-study/end-of-semester maintenance 11

General Information

1. Please remember that **participation in research is always optional**. No student is obligated to participate in your research study and your recruitment methods should NOT be coercive. Participants always have the right to withdraw from your study at any time without penalty.

2. **ALL** research in the Psychology Department that intends to use Hendrix College students as participants **must** be advertised through Sona Systems. The purpose of this framework is to centralize our system of tracking research participation in the department, so please ensure that all of your studies are properly represented in this framework.
    a. **Important related note:** When collecting data via **Survey Monkey**, please make sure that you have a system in place to "catch" Sona users who participate in online research without signing up via Sona Systems. If a online study is advertised through *Hendrix Today* (for example), some Sona users may click on the study link, instead of signing up via the Sona website. For those individuals, a system for manually assigning credit via Sona will be needed (see page 11 of this guide).

3. It is **UP TO YOU** to check your Sona profile, regularly, to keep track of your appointments and to make sure that you did not accidentally create a session that you cannot attend. **If you create a session you must either (a) show up to conduct the session or (b) cancel no later than 5:00 pm on the day before the scheduled session. Do not create a session unless you are sure you can make it and already have a testing room reserved. If you fail to show up for an experimental session, both the system coordinator and your faculty advisor will be notified of your absence.**

4. All research studies **MUST** be approved by the HSRB and/or a faculty sponsor (class projects ONLY) before being posted to Sona Systems. **Please see page 5 of this guide for sample HSRB information.**

5. **The deadline for ASSIGNING research extra credit to participants is ALWAYS 5:00 pm on the last day of classes. However, please note that participants must also be able to allocate their credit to the appropriate class by this deadline. Therefore, it is STRONGLY recommended that you assign all credits at least 24 hours before this deadline.**

6. At the conclusion of a study or the end of a semester, you **MUST** switch your study to "inactive" (see page 11). If you are not currently recruiting participants for a study, the study should not be labeled as "active."

7. Recruiting participants through Sona Systems is a privilege. There are two specific ways in which you can lose this privilege:
    a. **Not following your HSRB/faculty sponsor approved protocol:** If your use of Sona Systems is inconsistent with your approved protocol (e.g., the length of time differs; the recruitment message differs; etc.), **you will immediately lose access to Sona Systems.**
    b. **Violating standard ethical practices**: If you recruit participants or conduct your study in a way that violates the ethical standards outlined in the Belmont Report (below), **you will immediately lose access to Sona Systems.**
        i. Three principles of the Belmont Report:
            1. **Respect for persons** – Researchers must protect the autonomy of all people and treat them with courtesy and respect, allowing for informed consent. Researchers must be truthful and conduct no deception. If deception is used, it must be undone during the debriefing process.
            2. **Beneficence** – "Do no harm." Maximize benefits and minimize costs/risks to participants.
            3. **Justice** – Researchers must ensure reasonable, non-exploitative, and well-considered procedures are administered fairly. The distribution of costs and benefits to *potential* research participants must be distributed fairly and equally.

Important Policies

The policies outlined below are in place for the mutual benefit of participants, researchers, and instructors. These policies reflect the goals of respecting the time of each member of the research community and conducting research efficiently. **It is important that you read and understand these policies on the first day of class. A lack of awareness or understanding of a policy will not excuse you from being held accountable to the policy.**

1. **Cancellation Policy**
    a. Please show up for your sessions on time. Plan in advance and give yourself enough time to get to the experiment location and set-up before your participant is to arrive.
    b. **If you must cancel, then it is necessary for you to do so by 5:00 pm on the day before the scheduled experiment.** There are three ways to cancel:
        i. using the "cancel" option on the website (**preferred; see pages 9-10 in this guide**);
        ii. e-mailing the participant; or
        iii. calling the participant on the phone.

        The e-mail address and phone number of the experimenter can be found by going to "My Schedule & Credits" and clicking on the name of the study (in some cases, you may need to click on "View Sign-Up History").
    c. **If you must cancel AFTER 5:00 PM on the day before the scheduled experiment (reserved for extenuating circumstances, such as unexpected illness), make every effort to contact the participant using as many of the above options as necessary, in order to being reported to the system coordinator and your faculty advisor.**
    d. Participants are held to the same cancellation policy as researchers; that is, participants are expected to notify researchers of any cancellation **by 5:00 pm the day before a scheduled session** and make every effort to reach researchers if a cancellation must occur after this deadline (only under extenuating circumstances).

2. **Researcher No-Show Policy**
    a. If a participant shows up for an appointment and you are not present to conduct the study, the participant will **notify the Research Participation System Coordinator** (psypool@hendrix.edu) with the study information and the participant will receive full credit for your study. The system coordinator will then notify your faculty advisor.
    b. If a participant shows up for an appointment that was cancelled by at least 5:00 pm on the previous day, he or she will not receive credit.

3. **Participant No-Show Policy**
    a. If a participant fails to show up for a scheduled experiment without cancelling in time or contacting the researcher, **the participant will not receive credit for that study and will be considered an unexcused no-show.**
        i. Showing up to the incorrect location or arriving at the wrong time **will be counted as an unexcused no-show**.
    b. If a participant contacts you before the beginning of a session to cancel, please mark this as an excused no-show.

4. **Credit Assignment and Dispute Policy**
    a. Researchers are expected to grant or deny credit to participants **within 24 hours of each session**. If the researcher does not take credit assignment action within 48 hours of a session, the researcher will be contacted directly by the Research Participation System Coordinator. The System Coordinator will enforce timely credit assignment action on behalf of the participant and will be automatically notified of any delinquencies by Sona Systems.
    b. If a participant believes that a researcher has made a credit assignment error, **the participant is to contact the researcher directly within 24 hours of the credit assignment action.**
        i. If researchers and participants cannot resolve the credit dispute themselves, the researcher's faculty sponsor (Principal Investigator) should be contacted.
        ii. If the Principal Investigator cannot resolve the credit dispute, please contact the Research Participation System Coordinator.
    c. **All credits must be assigned to participants NO LATER THAN 5:00 PM ON THE LAST DAY OF CLASSES. <u>There will be no exceptions to this policy</u>.**

5. **Participant Rights Policy**
    a. In order to protect the rights and safety of all participants, all studies available through the Sona Systems website must be approved by either the Hendrix College Human Subjects Review Board or the supervising faculty member (for class projects—e.g., research methods final projects—ONLY). This ensures that someone other than the researcher has determined that the procedures for a study follow strict ethical guidelines.
    b. Any potential risks must be revealed to participants prior to providing consent to participate and participants have the right to refuse consent for any study.
    c. Despite these safeguards, there are still wide variations in people's reactions to the different kinds of tasks they are asked to perform in research studies. **If a participant feels that he or she has been mistreated by a researcher or asked to perform tasks that make him or her uncomfortable, the participant has the right to leave any experiment at any time.** If a participant leaves an experiment early—for any reason—**<u>the participant will still receive full credit or payment for his or her participation</u>**.
    d. If you have any ethical concerns about a particular study, please contact the Chair of the Human Subjects Review Board at HSRB@hendrix.edu.

If you have any questions/concerns about any of these policies, or about particular studies you are conducting, you may contact the Research Participation System Coordinator via e-mail (psypool@hendrix.edu) or by using the below information.

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General Procedures

The following pages will walk you through the processes of requesting a researcher account, adding new studies, adding individual sessions to studies, deleting sessions, and granting or denying credit to participants. Please read through this document carefully. If you have any questions, please e-mail psypool@hendrix.edu and write "Sona help" in the subject line.

Requesting a researcher account

NOTE: A participant account is NOT the same as a researcher account. You must have a researcher account to create and recruit for new studies.

Sona accounts are valid for a full academic year. Thus, if you create a researcher account in the fall, it will still be active in the spring. All researcher accounts are deleted at the end of each academic year. So, even if you had a researcher account last year, you will need to request a new account for this academic year by following the below steps:

1. E-mail the Research Participation System Coordinator at psypool@hendrix.edu with the subject line "New researcher account."
2. Within 48 hours (typically, within 24 hours), the System Coordinator will send you an e-mail with your temporary login information.
3. Log-in to your new account within three (3) days of receiving the logon and password information.
4. Go to "My Profile" to change your temporary password to a password of your choosing.

Gaining HSRB approval to use Sona Systems for participant recruitment

Unless you are conducting a minimal-risk study for a class (that you will not publish; e.g., research methods final project), **you will need approval from the Human Subjects Review Board *before* collecting data.** Please follow the below template when preparing an HSRB proposal that utilizes Sona, as it contains all of the information that the HSRB will need regarding **SUBJECT SELECTION**. You may submit this information as an appendix that is referenced within **SUBJECT SELECTION**. This information should directly match information provided in Sona under "Basic Study Information" when creating a new study.

Study name: [Insert the study name that your PARTICIPANTS will see]

Detailed description: [Insert the description of your project that participants will see via Sona.]

Eligibility requirements: [This should be—verbatim—any participant eligibility requirements, pre-requisites, or disqualifiers you provide in Sona Systems. Unless you are requesting permission from the HSRB to recruit minors, there MUST be an age eligibility requirement of 18 years. Please use the following phrasing: "Participants must be 18 years or older"]

Duration: [Expected study duration advertised to participants; must be in 15-minute increments]

Points: [The number of points participants will earn for completing your study: 1 point for every 15 minutes online and 2 points for every 15 minutes in person]

Preparation: [This should be—verbatim—any preparation instructions provided to your participants, such as "Do not eat within 30 minutes of your scheduled appointment." If there are no preparations, write "none."]

Adding a new study

1. Sign-in to your researcher account at https://hendrix.sona-systems.com/

2. Click "Add New Study" on the top taskbar

3. Select your study type
   a. Standard study: This is your typical in-lab study that requires one contact with participants
   b. Two-part standard study: This is an in-lab study that requires participants to come to the lab on two separate occasions (e.g., an initial session + a follow-up session one week later)
   c. Online survey study: If you want to create an online survey within the Sona framework, choose this option. When participants sign-up for this type of study, the survey will immediately begin and must be completed in one sitting.
   d. Online external study: If you want to create an online study using Survey Monkey, choose this option. After signing up, participants will be given the link to your study on Survey Monkey via Sona. **This is currently the recommended option for online studies.**
      i. **Important related note:** When creating your study via **Survey Monkey**, please make sure that you have a system in place to "catch" Sona users who participate in online research without signing up via Sona Systems. If a online study is advertised through *Hendrix Today* (for example), some Sona users may click on the study link, instead of signing up via the Sona website. For those individuals, a system for manually assigning credit via Sona will be needed (see page 10 of this guide).

- **NOTE**: Unless you have funding to pay participants (e.g., Odyssey funding), you should be selecting the "Credit" version for each of the above study types.

4. Enter in your study information
   NOTE: This information MUST match the information provided to and approved by the HSRB and/or your faculty advisor! Failure to be consistent with your approved protocol will result in an immediate loss of Sona Systems privileges.
   a. Study name: This is the name that participants will see when browsing studies. Make this name informative, but make sure that it does not give away your hypotheses. For example, use "Product Preferences Among College Students" instead of "Testing the Effects of Font Color on Product Preferences."
   b. Brief abstract: Because you will provide a more detailed description below, the abstract is optional. If you choose to include an abstract, keep it very brief.
   c. Detailed description: This is where you will tell your participants details about what they will be asked to do during your study and how long the study will take. Below is a sample description:
      In this study, participants will be presented with descriptions of five different consumer products (e.g., a calculator; a pen) and asked to rate each product on several dimensions. After a short filler task, participants will then be asked to rate each product one more time.
   d. Eligibility requirements: Unless you receive permission from the HSRB or your faculty advisor (class research ONLY) to recruit minors, you **MUST** have an age eligibility requirement of 18 years. Please use the following phrasing: "Participants must be 18 years or older"
   e. Duration: Please list how long each session is expected to take. This should match the length of time reported in your HSRB application (if applicable) and should only be reported in 15 minute increments (e.g., 15 minutes; 30 minutes; 45 minutes).

f. Points: This represents how many Sona points your study will be worth. The departmental standard—which must be followed—is presented below:
    - In-lab studies: 2 points per every 15 minutes
    - Online studies: 1 point per every 15 minutes
g. Preparation: Only fill out this section if you need participants to do (or not do) something specific before participating in your study. For example, "Please do not eat anything within 1 hour prior to participating."
h. Researcher: Select the names of all researchers (your name; any co-investigators).
i. Principal investigator: This will be the name of the Psychology faculty sponsor for your project. **All studies MUST have a Psychology faculty sponsor!**
j. HSRB approval code: For studies requiring HSRB approval, **you must** enter the approval code that is contained within your approval memo from Dr. Kennedy or Dr. Kolev. For studies *not* requiring HSRB approval (e.g., final projects in Research Methods), you will leave this blank.
k. Approved?: Indicated whether or not your study has been approved by the Hendrix College HSRB or your supervising professor. If "No" is selected, your study will not be visible to participants.
l. Active study?: Any study currently collecting data should be listed as active.
m. Pre-requisites (must be approved by the HSRB and/or your advisor): If there are any studies that you want your participants to have completed before signing-up for your study, indicate this here. If you select any pre-requisites, only participants who meet this/these pre-requisite(s) will be able to see and sign-up for your study. If you do not have any pre-requisites, you can ignore this section.
n. Disqualifiers (must be approved by the HSRB and/or your advisor): If there are any studies that you **DO NOT** want your participants to have completed before signing-up for your study, indicate this here. If you select any disqualifiers, participants who meet this/these disqualifiers(s) will **NOT** be able to see and sign-up for your study. If you do not have any disqualifiers, you can ignore this section.
o. Course restrictions: If you welcome participants from any classes within the department, do not make any changes to this section. However, if you want to limit participation to certain classes (e.g., excluding Research Methods students or students from upper-level classes), please select all of the courses from which participation **IS allowed.**
p. Invitation code: This is another way to restrict participation. If a code is entered here, then only participants who have been provided the code will be allowed to sign-up.
q. Study URL: If your study is an online study created through Survey Monkey, this is where you will paste the web link to your survey.
    i. In order to track participation in your survey data file, add ?c=%SURVEY_CODE% to the end of your URL. For example,
        1. Link from Survey Monkey: https://www.surveymonkey.com/s/12345
        2. What you will enter into Sona: https://www.surveymonkey.com/s/12345?c=%SURVEY_CODE%
r. Study URL display: This will only appear for online studies. To prevent multiple responses from a single participant, it is recommended that you select "No" here, so that participants can only access the link once.
s. Participant sign-up deadline: Indicate how far in advance participants are allowed to sign-up for your study. If you do not want participants signing-up within two hours of a session start

time, put "2" in this box; when this deadline passes for each session, the system will close sign-ups for that session. **NOTE**: For online studies, it is recommended that you allow participants to sign-up at any time.

t. Should the researcher receive an e-mail notification when a participant signs up or cancels?: Indicate your preference here. It is recommended that you ask to receive e-mails for both sign-ups and cancellations.
u. Researchers at timeslot-level: If, for example, you are conducting a research project with a partner, selecting "Yes" will allow you to indicate who will be conducting each individual session. Select "No" if you are the only person conducting study sessions.
v. Can a participant sign-up for this study more than once?: It is not recommended that you allow participants to sign-up for your study more than once.
w. Shared comments: If you place any comments into this box, every individual with a researcher or principal investigator account within the Hendrix system will be able to see this message. If you have no shared comments, leave this box blank.
x. Private comments: If you place any comments into this box, any researcher or PI **associated with this study** will be able to see this message. If you have no private comments, leave this box blank.
y. **NOTE**: For **two-part standard studies**, you will enter the duration and points associated with the first part of the study under "Basic Information" and the duration and points associated with the second part of the study under "Two-Part Study Settings." Part 2 scheduling range allows you to specify how far apart the two sessions must occur and the scheduling leniency allows to you require participants to sign-up for **both** sessions at once ("Yes") or not ("No").

5. When you have the above information entered, click "Add This Study."

6. On the next screen, you will see a summary of the study information you just provided. Below the summary table, you will also see several options:
   a. View/administer time slots: Here, you can schedule individual sessions for your study.
   b. Timeslot usage summary: This will provide you with an overview of your timeslot usage. For example, you can see the number of total sign-ups you've had so far.
   c. Contact participants: Clicking this option will allow you to send a message to all or a subset of your participants.
   d. View bulk mail summary: This will provide a summary of all e-mails sent to multiple participants.
   e. Download prescreen responses: We are not currently using a department-wide prescreen questionnaire, so you can ignore this.
   f. Change study information: This is where you can change information about your study that you provided when you first created the study (e.g., title, duration, eligibility).
   g. Participant study view: This will show you a preview of what participants will see about your study before signing-up.
   h. Delete study: You will not use this option. Studies will be deleted by the System Coordinator at the end of each academic year.

Adding sessions to a study

1. From the main menu, click "My Studies."

2. Click "Timeslots" for the appropriate study (or part of a study).
    a. For standard studies (including two-part studies):
        i. To schedule one session at a time, click "Add A Timeslot."
        ii. To schedule multiple sessions at a time, click "Add Multiple Timeslots." Because you will be able to fully customize each session on the next page, you only need to worry about the below options on this page:
            1. Number of timeslots: Enter in the number of sessions you would like to schedule.
            2. Number of participants: Enter the number of participants that can sign up for each timeslot.
            3. Location: If all of your sessions will be conducted in the same room, use the drop-down menu to indicate that here (e.g., DWR 137). You can edit this for individual sessions on the next page, also.
                a. **NOTE: If your research will be conducted in a classroom (e.g., DWR 137, DWR 08) you MUST FIRST reserve this classroom with Mrs. Shaw.** Simply indicating a classroom location through Sona does NOT reserve the room for you.
                b. If you are using a location that is NOT listed in the drop-down menu (e.g., a faculty member's personal lab space), type the location in the textbox provided. **Be sure that you have permission to use this space first!**
        iii. Click "Add." On the next page, you can specify the details for each individual session. When you are finished, click "Add Selected Timeslots."

    b. For online studies:
        i. Click "Add a Timeslot."
        ii. Enter in the last possible date and time for data collection (after this date/time, participants will not be able to sign-up for your study).
        iii. Enter in the maximum number of participants that can participate in your study. **This should match the number provided to the HSRB under "Subject Selection" or the number specified to your supervising professor**.

Deleting sessions from a study
IMPORTANT – PLEASE READ CAREFULLY BEFORE DELETING ANY SESSIONS. Deleting an individual participant from a study is NOT the same as deleting a full session!

1. Deleting a session **BEFORE** a participant has signed up:
    a. From the main menu, click on "My Studies."
    b. Click "Timeslots" for the appropriate study (or part of a study).
        i. To delete an individual session, click the "Modify" button for the session. Click "Delete." On the next page, you will be asked to click this button again to verify your intention to delete the session.
        ii. To delete multiple sessions at once, click "Delete Multiple Timeslots." Indicate which sessions you would like to delete and then click "Delete Selected Timeslots."

2. Deleting a session **AFTER** a participant has signed up (**before 5:00 pm the day before the session**):
    a. From the main menu, click on "My Studies."
    b. Click "Timeslots" for the appropriate study (or part of a study).
        i. Click the "Modify" button for the session.
        ii. Under "Name", either click "[Cancel]" to delete an individual participant, or, if multiple participants are signed up and you want to cancel all of them, click "Cancel All Sign-ups for this Timeslot."
        iii. Write a brief message to your participant(s) to explain and apologize for the cancellation (optional, but a nice touch).
        iv. **NOTE: These instructions will ONLY delete a participant from your session. If you want to delete the entire session (so no other participants sign-up), you must now delete the session by following the instructions in the above section.**

3. Deleting a session **AFTER** a participant has signed up (**after 5:00 pm the day before a session**):
    a. **BEFORE** cancelling the session (see above), **please do the following:**
        i. Place a note on the door where the session was to be held that states that the session has been cancelled and asks the participant to write his or her participant ID number (contained in the sign-up confirmation e-mail) on the sign if he or she shows up.
            1. If the participant shows up to the session, you **must contact the System Coordinator and ask to have full credit for your study assigned to the participant.** This policy constitutes a minor penalty to you for failing to cancel with adequate notice.

Granting or denying participant credit

IMPORTANT: Please grant or deny credit to participants within 24 hours of each session.

1. From the main menu, click "My Studies."
2. To grant/deny multiple credits at once, click "View Your Uncredited Timeslots"(top of the screen).
    a. For standard studies (including two-part studies):
        i. In the column labeled "Grant Credit?" you will see radio buttons for "No Action Taken," "Grant Credit," "Unexcused No-Show," and "Excused No-Show."
            1. No action taken: This is the default selection. After a session has passed, resolve to update credit allocation as soon as possible (within 24 hours).
            2. Grant credit: If the participant showed up for your study and provided consent for participation, select this option.
                a. **NOTE:** If awarding any credit amount above (e.g., the study took longer than anticipated) or below (e.g., the participant had to leave early) than the points stated in your study description, please see the instructions for awarding credit individually.
            3. Unexcused no-show: If a participant did not show up for your study and did not inform you ahead of time, select this option.
            4. Excused no-show: If a participant did not show up for your study and **DID** inform you ahead of time (without formally cancelling), select this option.
        ii. Click "Grant Credits."

b. For online external studies (i.e., Survey Monkey studies):
   i. For participants who signed-up for your study via Sona Systems, you can verify participation by matching the ID Code in the "Participants" column ("Survey ID: X) with the "Custom Data" column in your Excel data file (if you used this option) from Survey Monkey before awarding credit.
   ii. **For participants who did NOT sign-up for your study via Sona Systems**, but *have* requested extra credit for a qualifying course, you will have to **manually add these participants to your study within the Sona Systems framework**. To do so, click on a timeslot for your study and scroll to the bottom of the page, where you will find the option for "Manual Sign-Up." Enter the student's last name in the "Last Name Manual Sign-Up Box." On the next page, you will be able to confirm the manual sign-up. **Please note that this only adds a participant to a session; it does NOT award them credit!** If you have any problems with manual sign-up, please first consult with your faculty sponsor. If questions remain, please email psypool@hendrix.edu.
c. For online survey studies (internal to Sona): Sona will grant credit automatically.

3. To grant/deny credit for individual sessions (in-lab or online), click "Timeslots" for the study.
   a. Click "Modify" for the specific session for which you want to grant or deny credit.
   b. At the bottom of the screen, you will see radio buttons representing your credit options (note: "Participated" is the same as "Grant Credit" above). Select the appropriate option.
   c. Specify the number of points to be awarded. The default number of points will reflect the amount specified when the study was created. If you are going to award extra or fewer credits to a participant, be sure to first discuss this with your faculty advisor.
   d. Click "Update Sign-Ups."

End-of-study/end-of-semester maintenance

To keep our system organized, researchers must update the system at the conclusion of a study or the end of a semester (whichever comes first).

1. From "My Studies," click the appropriate study name.

2. At the bottom of the screen, click "Change Study Information."

3. For the setting, "Active Study?" change the answer to "No."

4. At the end of each semester, the System Coordinator will delete all studies in the system.
   a. **For fall semester:** If you plan to continue the same research project into spring semester, please let the System Coordinator know by e-mailing psypool@hendrix.edu **NO LATER THAN 5:00 PM on the last day of classes** using the subject line, "Continuing study." In the body of the e-mail, please provide the title of your study, your name, and your faculty advisor's name. The System Coordinator will then leave your study in the database until the conclusion of spring semester.
      i. **NOTE:** Keeping your study in the system will prevent participants from signing-up for your study across multiple semesters. If you allow your study to be deleted at the end of fall semester and treat it as a new study at the beginning of spring semester, it is possible that you will have repeat participants.